



Association of Bay Area Governments

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December 23, 1981

Doris Sams, Controller
The San Francisco Foundation
425 California Street
San Francisco, California 94104

Dear Ms. Sams:

This letter transmits the final report for the Public Service Delivery Alternatives Project from June 1 to November 30, 1981.

The equipment inventory (SHARE) and recreation instructor directory (REC) are the two innovative programs which evolved from this project. These programs were recognized by the International City Management Association as being among the most innovative programs developed in the field of public administration during the past year.

A reasonable amount of sharing started during the project. However, the effectiveness and cost savings of these programs will not be fully realized until:

- o fleet managers realize the cost saving benefits of sharing equipment
- o broader marketing is made available
- o remaining slack capacity from pre-Prop. 13 days is reduced

We intend to continue research and coordination of these programs for at least another year. In fact, the members of the project advisory committee, at their own suggestion, will meet in early February to pursue this. I wish to acknowledge the efforts of the staff of DIAMETRICS in developing these programs and sheparding the innovative ideas to timely completion.

Thank you for your assistance in support of this innovative research. We'll keep you informed of our progress.

Sincerely,

Revan A. F. Tranter
Executive Director

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FINAL REPORT

SAN FRANCISCO FOUNDATION

CONTINUATION GRANT

THE PUBLIC SERVICE DELIVERY ALTERNATIVES PROJECT

SUBMITTED BY

ASSOCIATION OF BAY AREA GOVERNMENTS

December 1981

I. BACKGROUND

An eight-month study on public service delivery alternatives was conducted from June 1980 through February 1981. Two programs identified as innovative alternatives to service delivery with the potential for cost savings and revenue generation were:

- o SHARE - a computerized inventory of public works equipment available for rental or exchange as an alternative to equipment purchase or private vendor rental
- o REC - a computerized listing of recreation instructors which allows cities to expand the number and type of recreation programs offered.

Identifying candidate alternatives for testing, designing of SHARE and REC programs and collecting data for entry into computer models took most of the grant period. As a result, the SHARE and REC programs were only available for use a short amount of time, leaving little time for evaluation for effectiveness.

The Public Service Alternatives Committee (PSAC), consisting of city managers and county administrators from the five-county study area determined that SHARE and REC had the potential to contribute positively to changes in the way local governments do business. PSAC members suggested ABAG request a continuation grant from the Foundation.

II. CONTINUATION GRANT

In June 1981 the Foundation granted ABAG a six-month Continuation Grant to pursue the perceived benefits of the SHARE and REC Programs. As in the basic project, DIAMETRICS (ABAG's subsidiary non-profit corporation) conducted the study.

A. OBJECTIVES

MONTHS ONE TO THREE

- o Develop natural "clusters" that, by adding cities surrounding those already participating, would facilitate use of SHARE and REC.
- o With the support of members of the project advisory committee and again using the forums provided by the city/county managers' association meetings, solicit the direct and active participation of the additional cities.
- o Collect and enter the necessary data and issue new SHARE and REC directories to all participating jurisdictions.

MONTHS THREE THROUGH SIX

- o Encourage the use of the directories through the city/county managers association meetings (and other professional association meetings such as public works directors meetings where appropriate) and with advisory committee members' support.
- o Monitor the use of SHARE and REC and evaluate their effectiveness.
- o Make the methods and results known to other cities and counties throughout California.

B. PHASE I - June, July and August

During June and July the selected jurisdictions in the five-county study area were contacted regarding participation in the SHARE and REC programs. Equipment inventories and recreation instructor lists were collected, while updates were made to existing jurisdictions' inventories. On June 12, a memorandum from PSAC chairman, Bill Zaner, was mailed to all jurisdictions outlining the background, purpose and timing of the study. Project staff hand-delivered SHARE and REC binders to jurisdictions in San Mateo County (or if requested binders were mailed). In addition, all jurisdictions were contacted by telephone by selected PSAC members and project staff to urge participation.

As the end of July was nearing, project staff and PSAC members re-contacted jurisdictions that did not send inventories. The Project Director mailed a memorandum, again, encouraging participation. Several jurisdictions requested more time to prepare the information and, therefore, the collection period was extended by two weeks.

During the first two weeks of August, project staff entered the inventories received into the SHARE and REC Models. At this time collection was cut off so that maximum time would be allowed for actual use of the inventories.

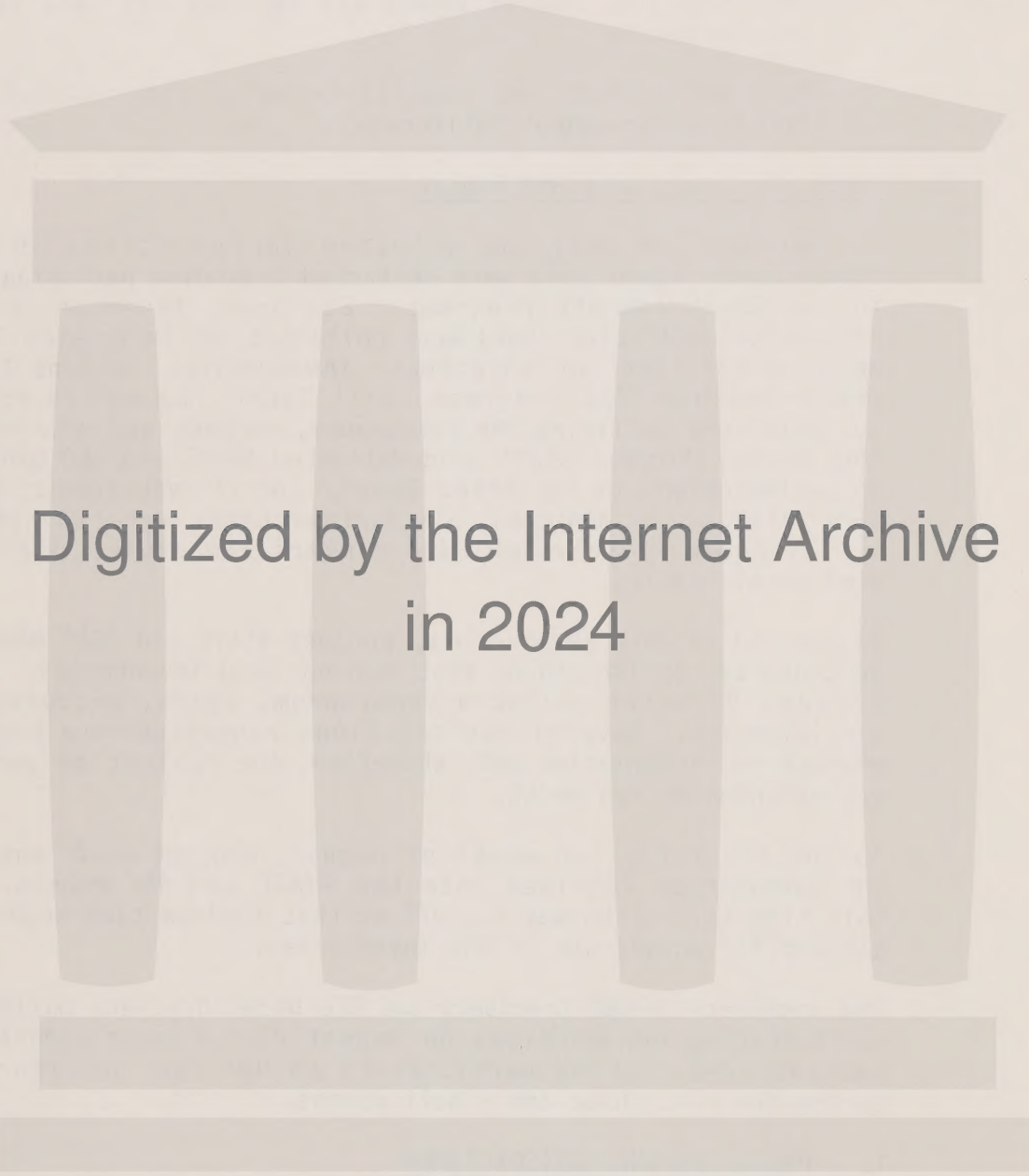
The complete SHARE Inventory and REC Directory were mailed to participating jurisdictions on August 20. A cover memorandum was included, asking participants to use the inventories during the next three and a half months.

1. PARTICIPATING JURISDICTIONS

A list of jurisdictions that are now participating in the SHARE Inventory and REC Directory is attached.

29 jurisdictions are now included in the SHARE Inventory;
13 were in previously.

26 jurisdictions are now included in the REC Directory;
14 were in previously.



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JURISDICTIONS INCLUDED IN THE SHARE AND REC PROGRAMS

SHARE

Alameda County

Fremont
Hayward
*Newark
Oakland
San Leandro
*Union City

Contra Costa County

Clayton
Concord
El Cerrito
Martinez
*Moraga
Pinole
San Pablo
Walnut Creek

*Marin County

Belvedere
*Corte Madera
*Fairfax
*Larkspur
Mill Valley
*Novato
*San Anselmo
*San Rafael
*Sausalito
*Tiburon

*San Francisco

San Mateo County

*Belmont
*Pacifica
*City of San Mateo

13 old jurisdictions
16 new jurisdictions

29 Jurisdictions included
IN SHARE INVENTORY

REC

Alameda County

*Alameda
*Hayward Area Recreation District
Piedmont
Pleasanton
San Leandro
*Union City

Contra Costa County

Concord
El Cerrito
Hercules
Lafayette
Martinez
San Pablo
*Walnut Creek

Marin County

Belvedere
Corte Madera
Larkspur
Mill Valley
Tiburon
*San Rafael

*San Francisco

*San Mateo County

*Belmont
*Foster City
*Pacifica
*Redwood City
*San Bruno

14 old jurisdictions
12 new jurisdictions

26 jurisdictions included
IN REC DIRECTORY

*new jurisdictions

Despite repeated efforts of both PSAC members and DIAMETRICS staff, several of the target jurisdictions did not choose to participate.

2. JURISDICTIONS NOT PARTICIPATING

Reasons why some jurisdictions did not participate included:

SHARE INVENTORY

- o no desire to share equipment
- o concern with being deluged with telephone calls
- o lack of staff time to prepare inventory
- o concern about liability
- o sharing was already taking place without a regional inventory

REC DIRECTORY

Jurisdictions were concerned that:

- o staff would be "ripped off"/other jurisdictions might raid instructors
- o city could be priced out of the market for specific staff positions
- o listing instructors names without permission could create liability
- o update would not be frequent enough
- o formal directory would "shortcut communications" between agencies at the professional level
- o formal directory would harm an already existing informal system
- o regional directory would detract from specialists interested in countywide recreation programming

C. PHASE II - September, October and November

Jurisdictions began using the SHARE and REC inventories during this period. A memorandum was mailed and telephone calls were made to city managers to encourage use through their county manager association meetings and public works (fleet managers) groups.

1. QUESTIONNAIRE

A one-page questionnaire was mailed to participating jurisdictions to help staff assess the value and success of the SHARE and REC programs.

a. Response to SHARE Questionnaire

Twenty of the twenty-nine participating jurisdictions responded to the SHARE questionnaire. Eleven jurisdictions had rented equipment through the inventory. In the comments section of the questionnaire, one fleet manager summarized the general feeling of other participants:

"I do believe the time has come for jurisdictions to share equipment, due to the high cost of ownership. I have discussed this program with other fleet managers in the area and find their concerns are, in my opinion, the fear of losing control of vehicles and equipment under their supervision. It is also my opinion before this program would be effective, city managers or county administrators must agree with the program and direct inter-department, inter-jurisdiction sharing of vehicles and equipment."

A summary of all questionnaire responses is attached. (Attachment 1)

b. Responses to REC Questionnaire

Seventeen of the twenty-six participating jurisdictions responded to the REC Questionnaire. Only six jurisdictions contacted a listed instructor; however, five jurisdictions noted that they could now offer new recreation courses.

Other types of information that recreation directors would find useful in the REC Directory included:

- o listing of adult education and teachers
- o listings of completed studies or statistics completed by various agencies
- o current fees for classes, leagues and rental space.
- o salary information
- o available hours

Recreation directors from Alameda, Contra Costa, San Mateo and San Francisco counties reported that the Directory was a good reference and resource tool. Marin County cities felt that a good network already existed within the county. Many jurisdictions were between sessions and noted that they would use the Directory for next quarter's scheduling.

A summary of responses to the REC Questionnaire is attached. (Attachment 2)

2. SPREADING THE WORD

a. Nationwide

ABAG received the 1981 ICMA Management Innovation Award for the SHARE and REC Programs. Articles about the innovations appeared in the ICMA newsletter which was distributed throughout the country.

b. Statewide

On October 16, 17, and 18, ABAG and DIAMETRICS shared a booth at the 4th Annual League of California Cities Exposition in San Francisco. In addition to demonstrating ongoing programs at ABAG and DIAMETRICS, the SHARE and REC inventories were available for review, a two-page information sheet was prepared, and DIAMETRICS staff reported on the Public Service Delivery Alternatives project to interested parties. (Attachment 3)

c. Local

At the request of a Supervisor from Santa Clara County, DIAMETRICS' staff made a presentation on the SHARE and REC programs to the Santa Clara County City Managers Association. Interest in these cost-saving programs was shown and the County attempted to set up their own programs based on these models.

3. PUBLIC SERVICE ALTERNATIVES COMMITTEE

A meeting of the Public Service Alternatives Committee (PSAC) was held at the end of the grant period. Members of the committee felt that the SHARE and REC programs were underutilized. It was pointed out that fleet managers were fearful of losing control over equipment although they recognized the need to share. James DeChaine, member, observed that slack capacity remained from more halcyon times.

PSAC members felt the keys to usage of the SHARE and REC systems were:

- (1) the city manager must be sold on the idea
- (2) the fleet managers needed to be educated on the benefits
- (3) the idea needed to be incorporated into the next budget process.

The Committee felt that innovation would not occur until the "crunch" occurred.

Two marketing strategies were suggested at this meeting. They included:

- (1) locating a sponsor to underwrite costs and allow for broader marketing
- (2) charging a fee for recreation instructors to list names and subscribe to a listing

4. NEXT STEPS

Members of PSAC offered to contact jurisdictions included in the programs and to encourage use.

ABAG staff pledged to find funds for one year to continue the SHARE Program. DIAMETRICS staff agreed to prepare a report for city managers to take to their January 1982 budget meetings and to share with their fleet managers.

5. FINANCIAL REPORT

See attached.

SHARE QUESTIONNAIRE

no reply

... finally excited about this project.

11 jurisdictions rented equipment from another jurisdiction
3 jurisdiction tried to rent equipment but equipment was
0 problems occurred with the rental of another jurisdiction's
equipment

REC QUESTIONNAIRE

Did you contact a recreation instructor listed by another jurisdiction?	A	H	P	P	S	U	C	E	H	L	M	S	W	B	C	L	M	T	S		G	S	F	P	R	S
Was the recreation instructor available?	---	Y	N	N	Y	N	Y	N	---	Y	---	N	N	---	N	N	N	---	---		N	Y	N	N	N	N
Will you offer a different recreation activity now?			N	N	N	N	N	N		Y		N			N	N				N	Y	N	N	N	N	
Did you find the Directory helpful?		Y	Y	Y	Y	Y	Y	Y		Y		N				Y				Y	Y	Y	Y	N	Y	
What other type of information would be helpful?																Y				Y						

Adult Education and Teachers.
List of completed studies or statistics completed by various recreation and/or park agencies.
Home addresses and phones are more beneficial than agency.
Current fees for classes, leagues and rental space.
Day Care, Park Information.
Salary Information/hours available.

Comments:

Very handy reference tool.
Needs more agencies listed
so travel time is less.
Should become more effective
as personnel become use to it.
If caught short, I can call
neighboring agencies w/o use of
Directory.
Very useful resource.
Future instructor needs will test usefulness.

SUMMARY

17 jurisdictions responded to the questionnaire
9 jurisdictions did not respond to questionnaire

6 jurisdictions contacted a listed instructor
4 of the contacted instructors were available
5 jurisdictions will now offer a new recreation activity
14 jurisdictions found the Directory helpful
3 jurisdictions did not find the Directory helpful



DIAMETRICS
DECISION INFORMATION & ANALYSIS

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THE SHARE AND REC PROGRAMS

With a grant awarded to ABAG from the San Francisco Foundation, DIAMETRICS conducted an eight-month project on public service delivery alternatives. Two ideas tested as innovative alternatives to service delivery with the potential for cost savings and revenue generation were:

- o SHARE - a computerized inventory of public works equipment available for rental or exchange. SHARE provides an alternative to equipment purchase or private vendor rental.
- o REC - a computerized listing of recreation instructors. REC allows cities to expand the number and type of recreation programs offered.

An advisory committee of city managers and county administrators from the five-county study area (Alameda, Contra Costa, Marin, San Mateo and San Francisco) guided the project. They determined that:

- o SHARE and REC have the potential to contribute positively to changes in the way that local governments do business--a necessity in light of continued fiscal constraints.
- o The benefits of cost savings and additional revenues, while relatively small in the overall context of local government expenditures, are enhanced by the potential for long-run attitude changes, such as entrepreneurship by department heads and other government officials. These models also lend themselves to expansion into other areas which substantially extend the savings.

A description of the SHARE and REC Programs is attached.

For more detailed information about these programs, contact Charles R. Lewis, IV, Executive Vice President or Marci Loss, Project Coordinator at (415) 849-1788 or (415) 849-1899 or write to DIAMETRICS at 2437 Durant Avenue, Room 205, Berkeley, California 94704.

DIAMETRICS designed a computerized equipment inventory program called SHARE. The purpose of this program is to provide a mechanism to exchange information about large, seldomly used equipment so that jurisdictions have the option of borrowing or renting equipment from a neighboring jurisdiction rather than purchasing it. The SHARE inventory includes information about the equipment's location, manufacturer, identification number, rental rate, availability and contact number.

In operation, SHARE provides a jurisdiction with an additional set of options when equipment is needed. For example, Jurisdiction X had staff available to trim trees in the civic center area, but the parks and recreation director was not able to use this staff to maximum efficiency because the Jurisdiction did not have sufficient Hi-Rangers (cherry pickers) and chippers available for all of the staff teams. In this situation, the director would have the choice of either leasing the Hi-Rangers from a private equipment rental agency or requiring some of the team to trim the trees inefficiently by climbing or using ground ladders. The latter method is slow, dangerous and wastes time and money. But, the private equipment rental would cost approximately \$3,000 for a one-month lease.

On the other hand, Jurisdiction Y might have the Hi-ranger available in the corporation yard. The Jurisdiction's finance director knows that the fully amortized cost of the equipment is approximately \$10/hour of use. Therefore, the equipment would cost approximately \$1500 per month. This equipment represents an investment of taxpayer monies, but it is of little value to the tax payer when stored in the yard.

However, Jurisdiction Y might be willing to loan the Hi-Ranger to Jurisdiction X if they could be assured of recovering the cost of the use and the time necessary to arrange the loan. In this example, we could assume that Jurisdiction Y has stated a willingness to consider renting the Hi-ranger if it is not needed for use by their own staff. In this case the rental rate is \$2000 per month.

Therefore, through the SHARE Equipment Inventory, Jurisdiction Y would recover the amortized cost of the Hi-Ranger with no expense to the taxpayers. In addition, the residents of Jurisdiction Y could "make" another \$500 through the rental or otherwise under-utilized equipment.

On the other hand, Jurisdiction X could make more efficient use of their staff and save at least \$1000 over commercial rental rates and several thousand dollars over the cost of buying the extra equipment.

2. REC Program

The other computerized program DIAMETRICS designed is a directory of recreation instructors called REC. The purpose of this directory is to provide access to a wide range of recreation instructors.

In use, the REC Directory would assist recreation directors in two important ways. When residents from one jurisdiction ask for a Jazz Exercise Class that is not currently available, the director can locate a program in a neighboring jurisdiction or locate an instructor who has references from another jurisdiction. The director can either suggest that residents join the neighboring jurisdiction's class (rather than starting a competing program, both of which might fold for lack of participants) or contact the jazz exercise instructor about starting a class in that jurisdiction.



EXAMPLES OF SHARE IN ACTION

Martinez Striper a Star

Martinez's paint striper is earning its pay-off through SHARE. It was sent to the rescue in Pinole recently when Pinole's striper broke down in the middle of a project. Martinez not only set the equipment, but also an operator to perform the work. Pinole had its project completed on schedule and Martinez was paid for the operator's time and the rental of this \$20,000 piece of equipment.

Oakland Aids Clayton with Weed Wars

The city of Clayton with a population of only 4,000 hasn't the money or the storage space for a weed sprayer, but this spring it will be weed-free anyway. Through SHARE, Clayton will rent Oakland's 600-gallon sprayer at a nominal fee of \$80 per day. The cost to purchase this would be more than \$16,000.

Mill Valley SHAREs

Mill Valley has been using SHARE to full advantage. The city recently rented its sewer television and sealing unit to Corte Madera. At the time, Mill Valley wasn't using that equipment and was more than happy to see it rented. Corte Madera was pleased with both the results and the price. Mill Valley also gained some unexpected cash to tuck into its general fund.

Mill Valley was also able to rent a brush cutter from Marin County for only \$200 through SHARE program. Mill Valley estimates it could have cost three times that amount to use city staff and hand equipment to complete the project.

FOR INFORMATION

For more detailed information, contact DIAMETRICS Executive Vice President Charles R. Lewis, IV, or Marci Loss, Project Coordinator at (415) 849-1788 or (415) 849-1899.

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